S2S
Service coordination
An Infoxchange enterprise

Electronic Service Coordination Referral System

User Manual

February 2009

Australia
Infoxchange
Technology for social justice

1.0 INTRODUCTION

This manual describes how to create referrals and manage clients on the S2S Electronic Service Coordination Referral System. The eReferral system provides a single online hub for communication and service coordination between health and welfare services across a wide range of service networks.

2.0 REGISTERING

All users of the referral system must first register with S2S by completing an on-line form. This form allows you to assign yourself a username and initial password. As well as completing the form, a manager must still send authorization to Infoxchange for access to be given to the system. Follow the steps below to register:

1. Go to the S2S Service Coordination website: www.s2s.org.au
2. Click on the link at the top of the page: **Register / sign in**

3. Click on the link on the bottom right in blue: **Register for S2S**

   A registration form will be displayed. See Appendix .13.1

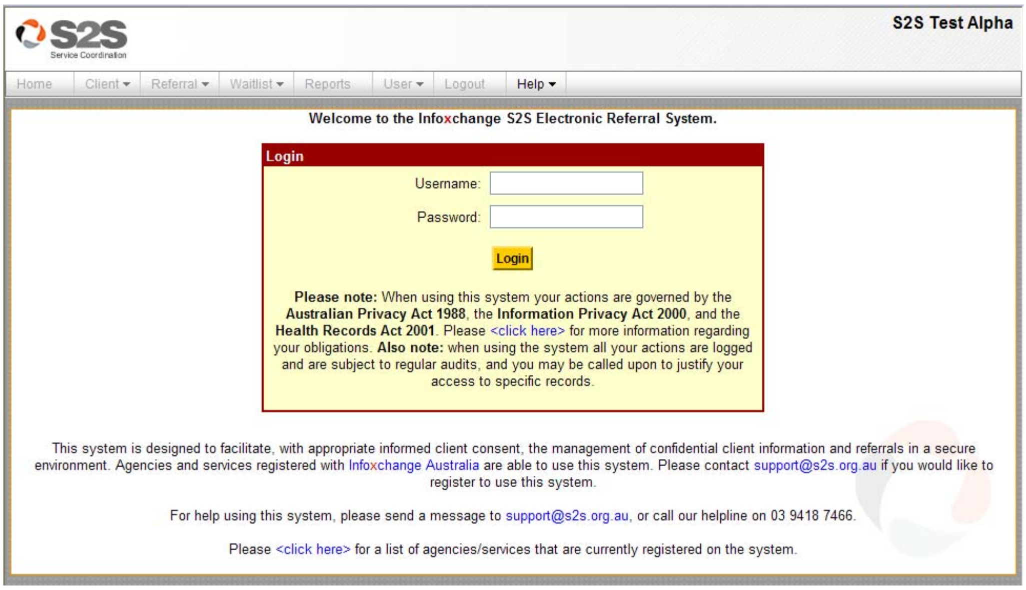
4. Complete the form and assign yourself a username and initial password. (6 - 12 characters). If you need to write it down, please keep it in a safe place.

   Note: *The username assigned here is a public name, it is therefore recommended to select a username based on your actual name. (i.e. jsmith).*

5. Click **Submit**.

3.0 LOGGING IN

The welcome page of the eReferral website will ask for a username and password and is shown below.



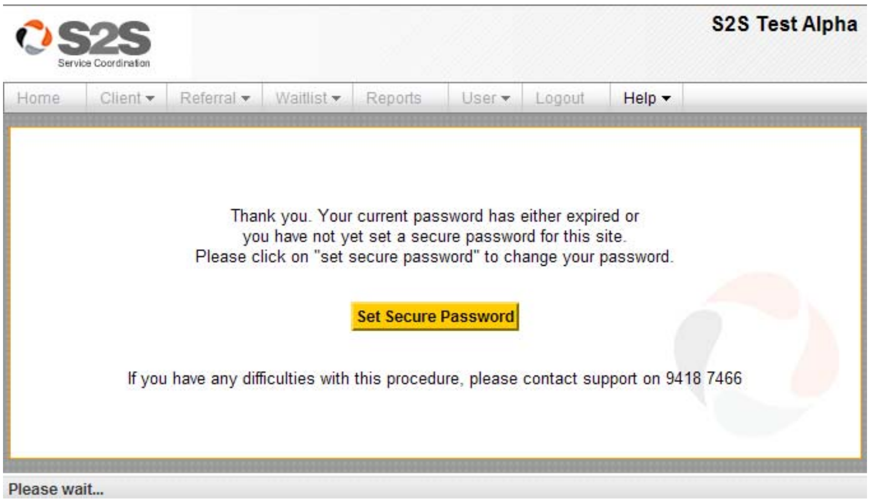
3.1 First Time Users

First time users of the eReferral system will be prompted to set a secure password.

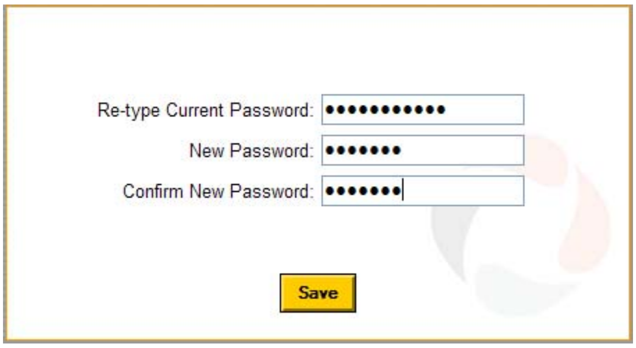
1. Enter your **username** and **first password** in the login area.

   You will be prompted to set a new secure password for the system.

2. You will now be prompted to change your password to a **secure** password. Click **set secure password**.



3 In the section that says ‘Re-type Current Password’, enter the initial password you used to get to this far. You should then set a secure password by entering it twice. Click **Save**.



Password Hints: *Passwords should contain a minimum of 6 & maximum of 12 characters and should not be a dictionary word. You will need to change this password every three months*

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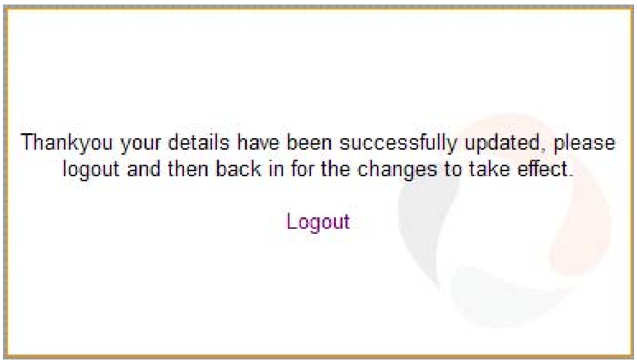
4 When the information is saved you will be prompted to **Logout.**



5 Log back in again using the same username and new **Secure Password.**

NOTE: *The new secure password will also give you access to the waitlist system if you are registering for the waitlist aswell.*

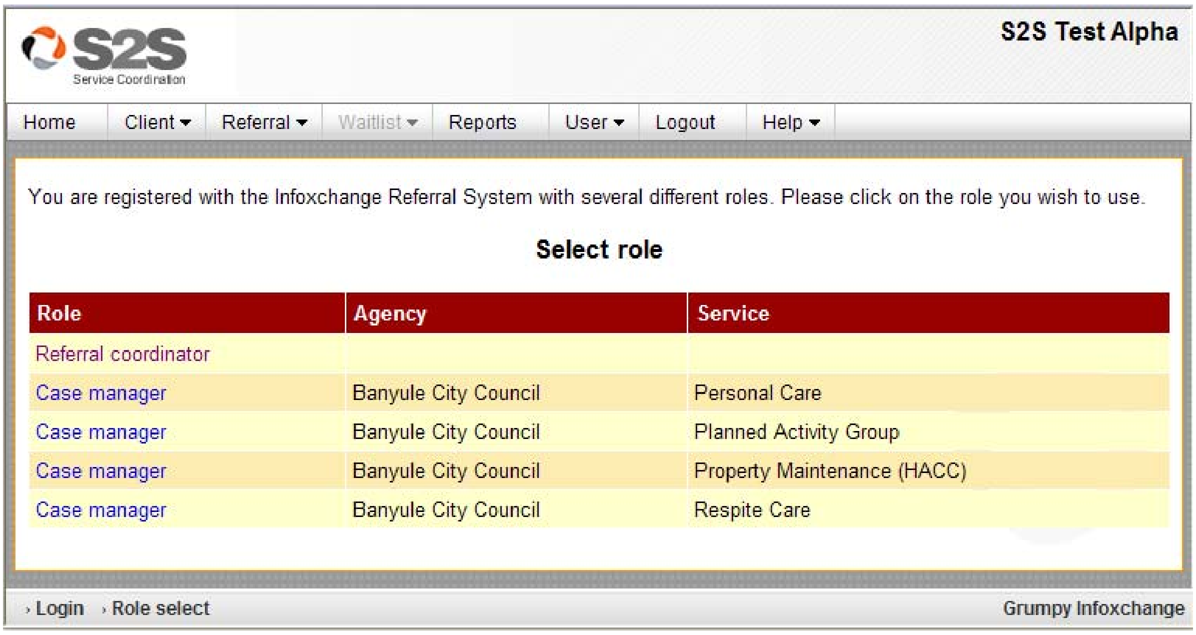
4.0 ROLES

General users - General users of the system will be allocated a title such as Practitioner, Case Manager or one reflecting their job title. Users with this level of access will be able to receive and send referrals, and may be allocated referrals from the Referral Coordinator/Service Coordinator.

Service Coordinator - Service Coordinators receive all incoming referrals on behalf of a service, can allocate referrals to other users within the service and may also send referrals. They can only view and process incoming referrals for the one service they logged into.

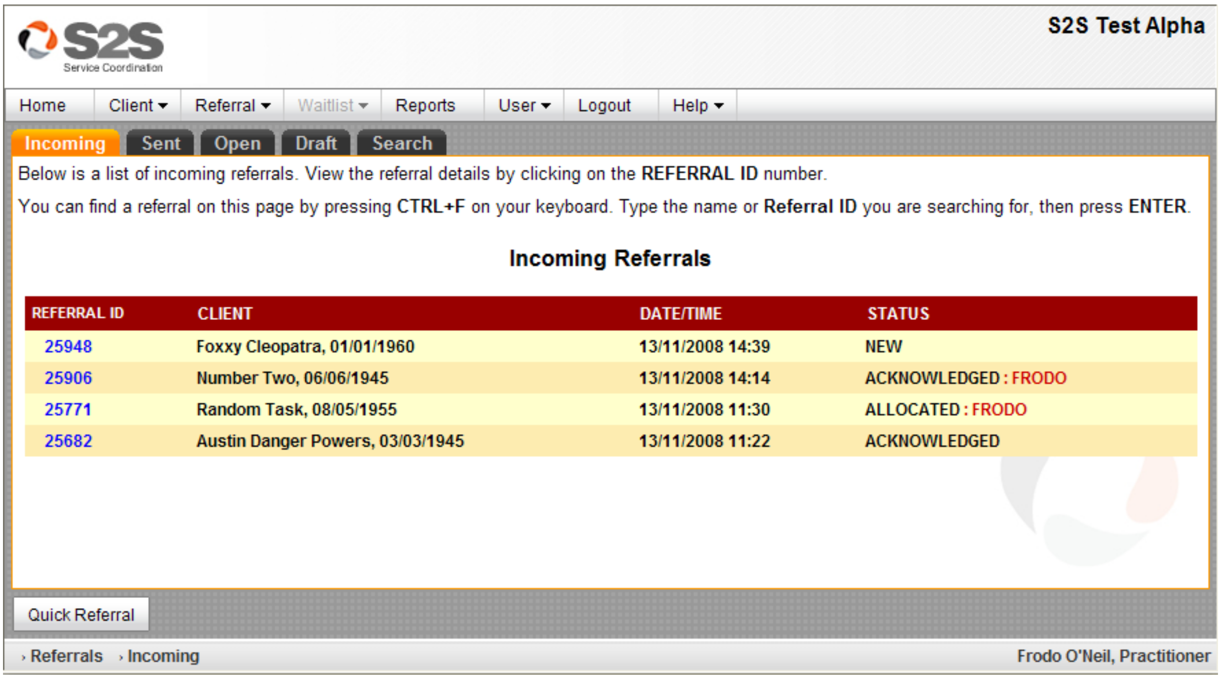
Referral Coordinator - Referral Coordinators receive all incoming referrals, can allocate referrals to other users within the service and may also send referrals. They can view referrals to all services they manage at the same time without having to switch roles.

If you have more than one role in the system, you will be required to select the role you want to view:



You can switch between roles by hovering your mouse over the User menu button and then over switch roles. When you have put your mouse over the role you want to select, left click.

If you only have one role in the system, you will be directed to the home page.

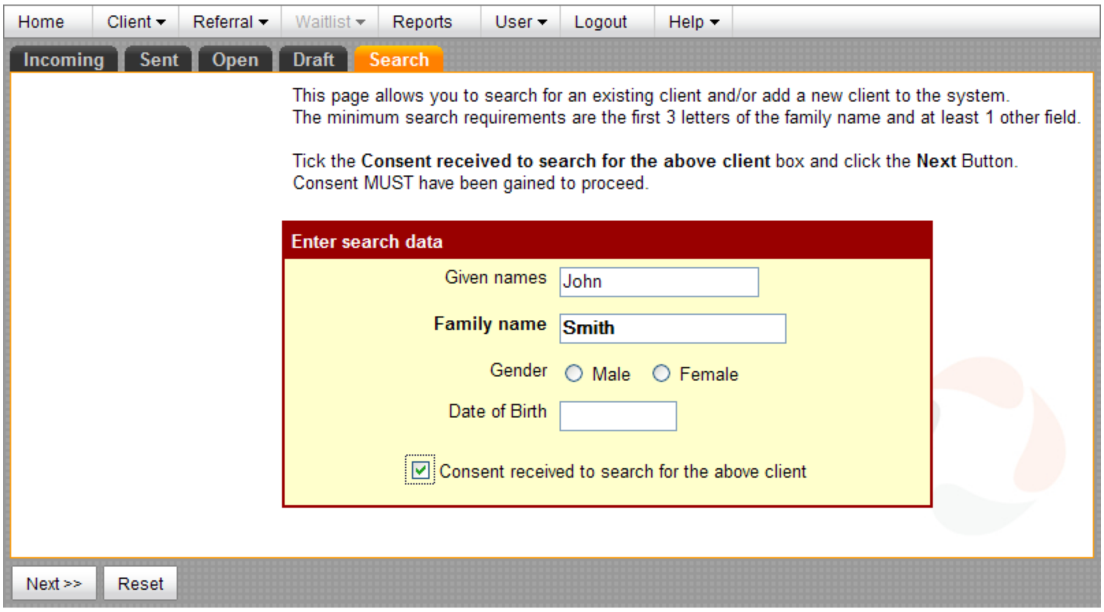


5.0 MAKING A REFERRAL

Before adding a new client to the eReferral system, a search needs to be carried out to check if the client is already on the system.

5.1 Searching for a Client

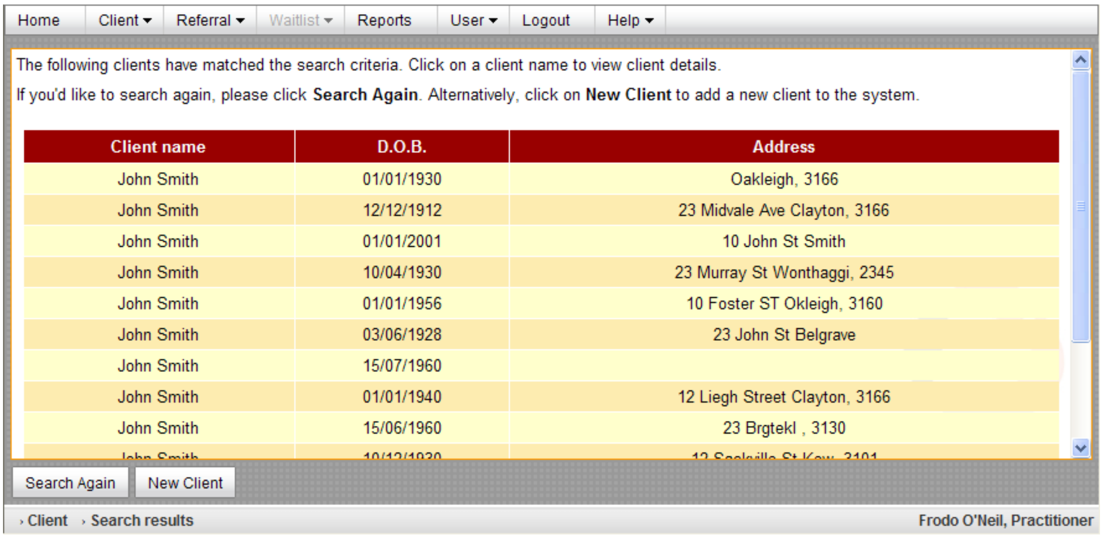
1. Click the **Quick Referral** button or the **Search** tab.
2. Enter **Search Data** *(surname, sex and consent are sufficient to start a search).*



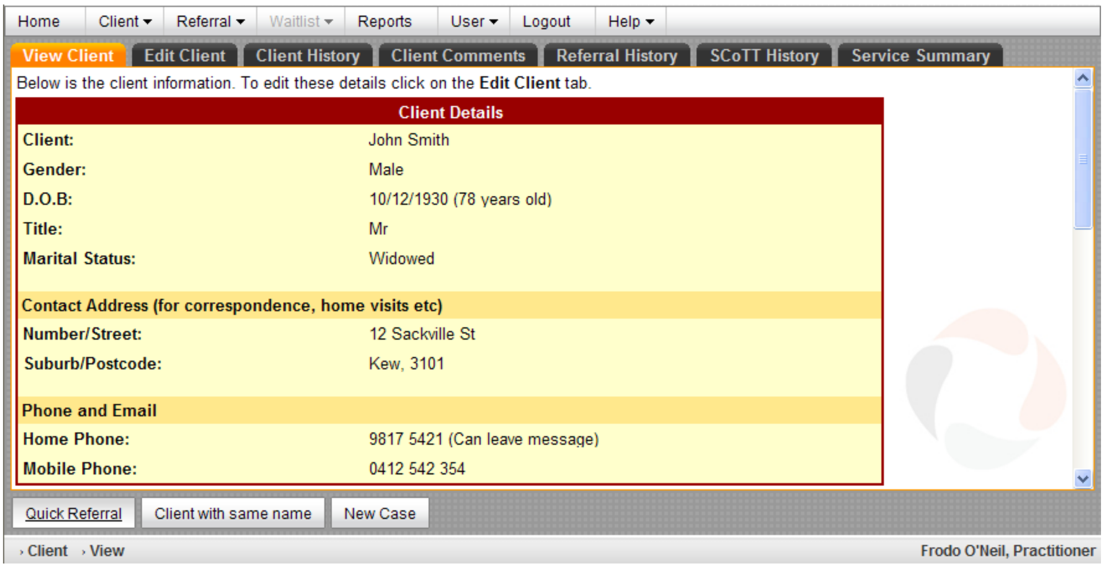
Nb. Less details in each field will give a larger number of clients and may pick up different/incorrect spellings etc. Min 3 characters for surname unless it is an exact match.

3. Tick the **Consent to search for the above client** box.
4. Click the **Next** button.

5 If there are clients matching the search a list will be generated. Click on any of the clients to view the client's details or make a referral.



6 Changes to the client record can be made by clicking the **Edit Client** tab and later clicking the **Save** button at the bottom of the screen.



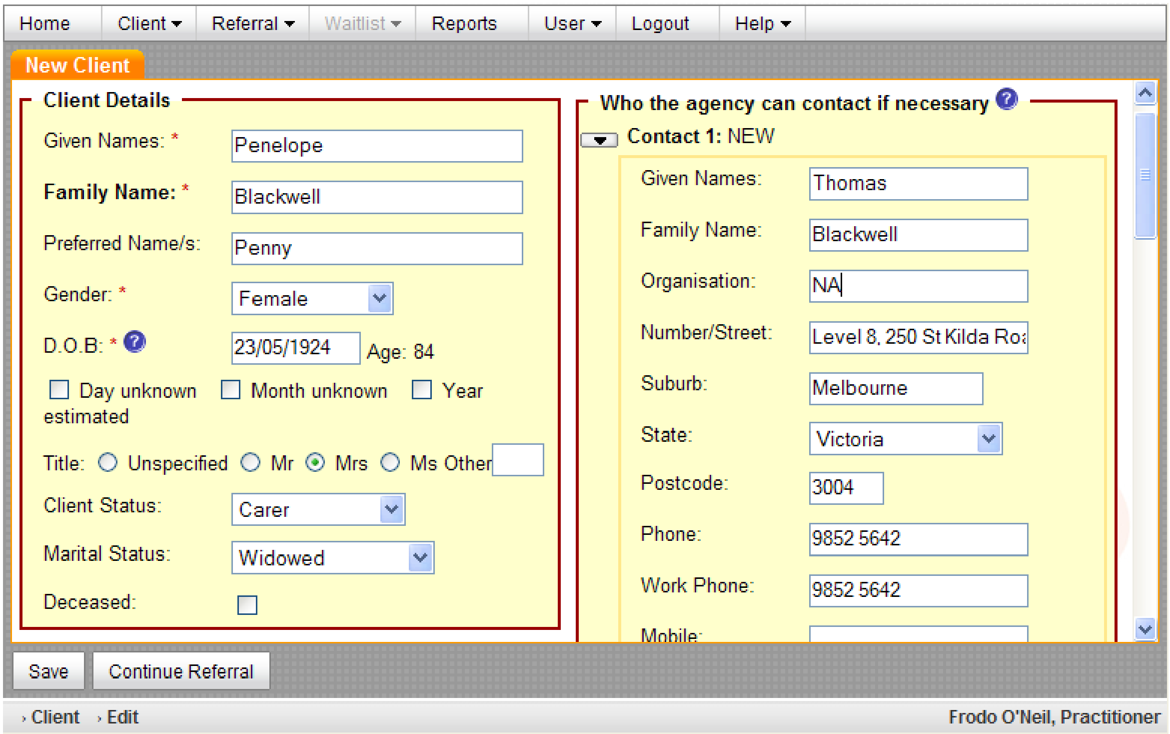
7 To continue with the referral click the **Quick Referral** button.

8 To add a new client with the same name, click on **Client with same name** button

5.2 Adding a New Client

If no client is found resembling the client you entered into the search you will need to be add them. If it a list of clients appears, but it is not your client, click on **Client with same name** button. Otherwise, a screen will appear with the details that have already been entered about the client, and blank fields to be populated with data.

1 Enter client data



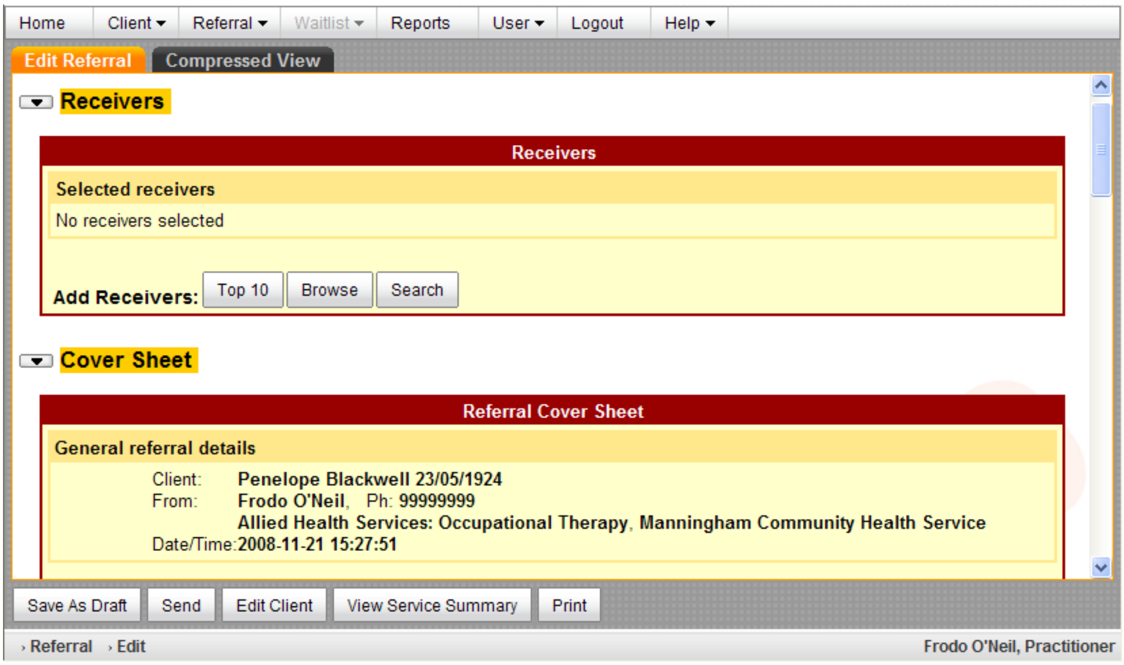
Fields with red asterisk must be completed.

2 Click the **Save** button at the bottom left of the screen or **Continue Referral**.

The client data will be saved and remain on the screen. You will now have the option to (1) continue referral by clicking the next button, (2) make changes and save again, (3) reset and start again, (4) add a different client with the same name or (5) create a new case.

3 Click **Next>>** to continue with the referral process.

The screen should appear as below. You can scroll down to look at more detail.



5.3 Sending the Referral

To send a referral you will need to complete all of the following:

- Select an agency to receive the referral
- Complete the Cover Sheet
- Attach the SCoTT information or complete the online forms
- Get Consent
- Send

5.3.1 Selecting an Agency to Receive the Referral

Referrals may be sent via the S2S System using one of the following methods:

- Electronic referral to member agencies fully registered with the S2S system. Click on **Top 10** or **Browse**
- Fax referral, using the FAX gateway. Click on **Search**
- Secure email referral, using the PKI email facility. Click on **Search**

Select a service to receive a referral by clicking on one of the following buttons:

- **Top 10**
- **Browse**
- **Search option**

<u>Top 10</u>

Top 10 lists the 10 providers that your service has sent the most referrals to.

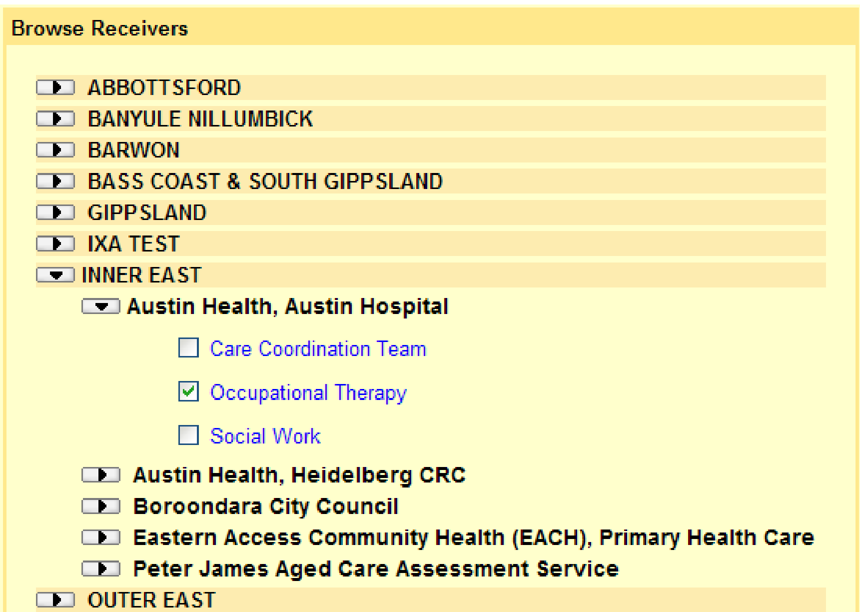
1 Click on the **Top 10** button.

2 Tick the box next to the service you wish to refer to.

3 Click on the **Done** button when the selection is complete. The service will show up in the box as selected.

Browse

If you cannot find the provider you are looking for under top 10, click **Browse** and a list of all member agencies fully registered with the S2S system will appear. Click on the **Browse** button.



1 Click on the arrow besides the relevant **region** and **agency**.

2 Tick the box next to the **service** you wish to refer to.

3 Click on Done

Search

Clicking on **Search** allows referrals to be sent via fax or email to services not registered with the S2S eReferral system. The fax gateway allows referrals to be sent via fax from the system to a direct, secure, fax number. The PKI facility allows referrals to be emailed to services with a secure PKI facility installed.

1 Click on the **Search** button.

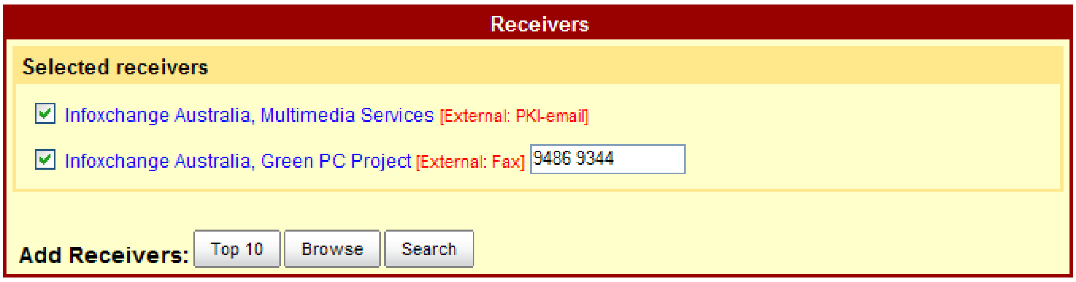
2 Type in the service name and/or suburb.

3 Tick **Include External Services** to refer to services not registered with S2S.

4 Click **Search Service Seeker**

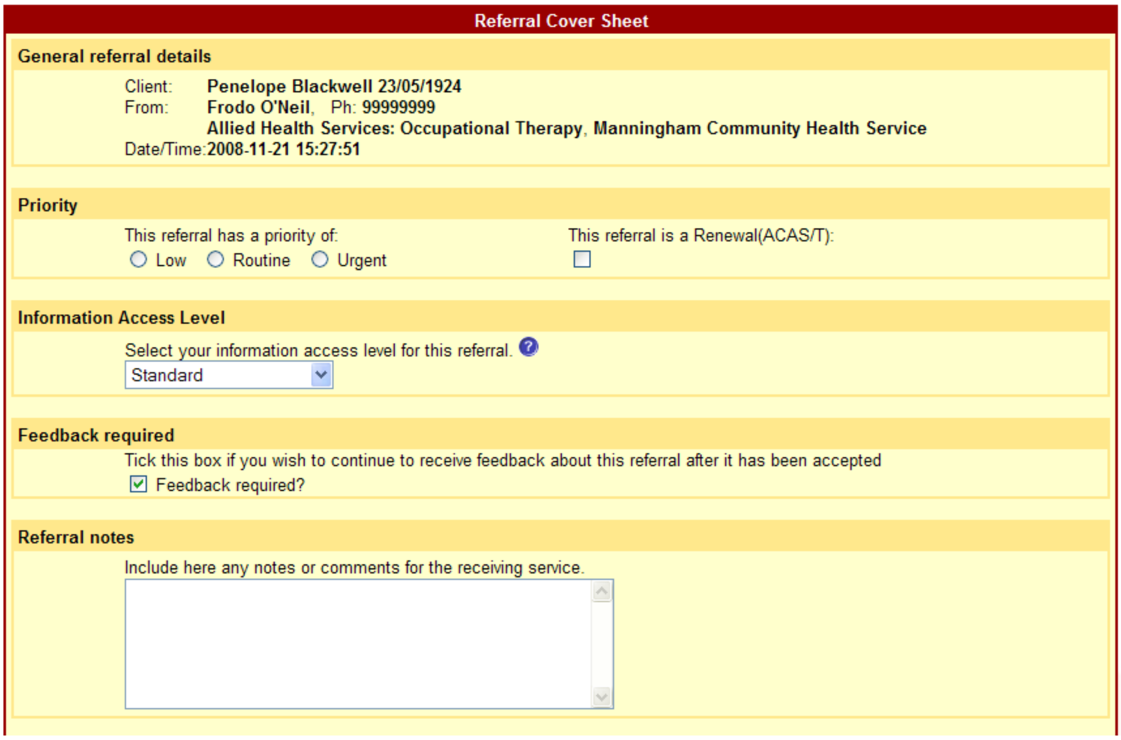
5 Navigate to the service required & tick the box next to the service you wish to refer to.

6 Click on the **Done** button when the selection is complete. If required, type in the fax number of the agency in the space provided



NOTE: Any external attachments will need to be sent separately when faxing.

5.3.2 Completing the Referral Cover Sheet



The following sections of the Cover Sheet should be completed:

- **Priority**
  Select the priority level of the referral: Low / Routine/ Urgent

- **Information Access Level:**
  There are 3 levels of privacy to choose from that determine who will be able to view the referral details. The default is set to 'standard'.

Standard:	Client information can be accessed with client consent.
Limited:	Only the referral event may be accessed with client consent.
Sender/Receiver Only:	Only the sender and receiver can see that the referral has occurred.

- **Feedback Required**
  This box is pre-ticked by default. You will continue to receive feedback about this referral after it has been accepted. Untick this box if you do not wish to receive feedback after the referral has been accepted.

- **Referral Notes**
  Record any notes as part of the referral, such as the purpose of the referral.

5.3.3 Completing SCoTT Forms

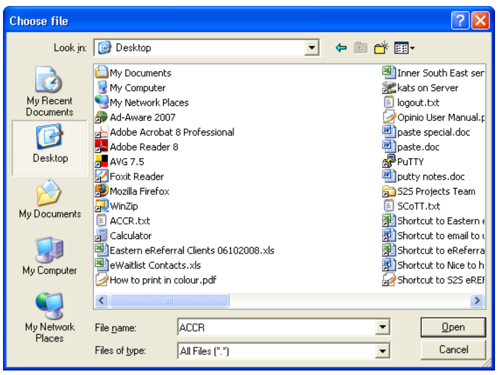
The SCoTT forms may either be completed on-line or attached to the referral from your client management system. You will need to save the file into an appropriate format to send as an attachment prior to commencing the referral process.

- **Attachments**

  To attach documents to the referral follow the steps below:

  1 Click on **Browse** to locate the document

  2 Select the document to be attached



The 'File' field will be automatically populated with the document's name.

3 Enter a name or description of the document into the field marked **Label**. NB: (must not be blank)

Label: ACCR
File: C:\Documents and Setti Browse...

4 Click **Add Attachment** to attach the document.

Attachments [Included]

Attachments			
Label	Filename	Size	Delete
ACCR	ACCR.txt	4	☐

Note: You cannot use attached files when faxing a referral. (The files must be printed and faxed separately).

- **Online SCoTT Forms**

Eight online SCoTT forms are found below the attachment area, listed as follows:

Summary And Referral

Service Coordination Plan

Living and Caring Arrangements

Health Conditions

Psychosocial Profile

Functional Profile

Functional Assessment Summary

Health Behaviours

Click on the black arrow/triangle to the left of the profile name to open each section and complete the form as required.

SCoTT profiles listed with **[Required]** next to the name are the minimum requirements for a referral to the selected service. When completed, the profile will be listed with **[Included]** next to its name.

5.3.4 Service Specific Forms

Two additional online forms are available for specific Services, Personal Alert Victoria and Part B Carer Referral Form. These standard forms can be accessed and completed in exactly the same way as the SCoTT Forms.

Personal Alert Victoria

Part B Carer Referral Form

5.3.5 Record of Consent

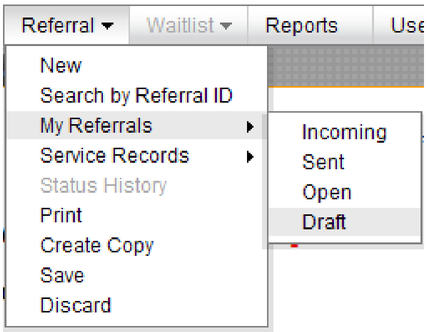
Mark the consent tick box to indicate that you have received consent from the consumer to make this referral on their behalf.

5.3.6 Completing the Referral

Click on the **send** button at the bottom of the screen to complete the sending process.

5.4 Draft Tab

The **Draft** tab lists referrals that you have started, but not sent. At any time while creating a referral & before sending it, clicking on save with create a draft which will enable you to come back to it and send at a later date. From this area, a referral may be completed and sent or it may be discarded. To complete and send the referral click on the referral from the draft tab and complete the steps above, see *5.3 Sending the Referral.*

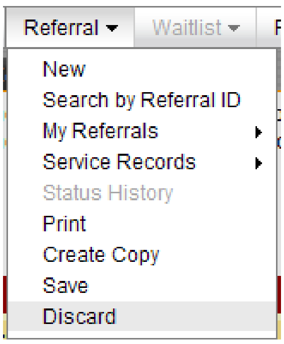


To discard a referral, follow the steps below:

1. Click on a referral in the draft tab.

   The Edit Referral page will be displayed.

2. Click on **Referral** from the menu bar.
3. Select **Discard** from the drop down menu options.



6.0 PROCESSING INCOMING REFERRALS

All new incoming referrals will be shown with a status as **new**. The first step in processing a referral is to change the status to **acknowledged**. Further status changes may then be made to reflect where a referral is in the system.

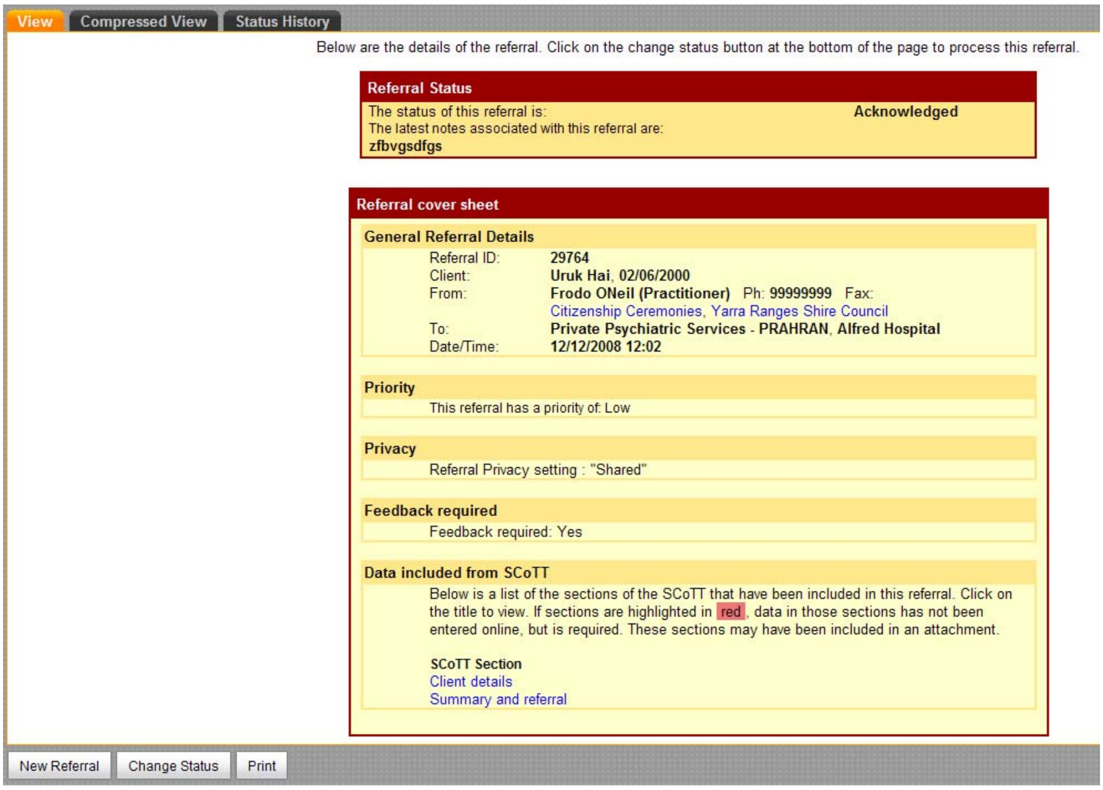
The referring agency will be notified of changes to a referral's status if feedback has been requested. (i.e. if "feedback required" is ticked in cover sheet – default setting).

REFERRAL ID	CLIENT	DATE/TIME	STATUS
34538	Gandolf Grey, 01/01/1901	09/01/2009 16:01	NEW : PKI
34535	Gandolf Grey, 01/01/1901	09/01/2009 16:01	NEW
34284	Asfolath Shadowfax, 06/09/1962	08/01/2009 17:00	ALLOCATED
34106	Gimli Morrior, 25/04/1920	08/01/2009 16:28	UNDER INVESTIGATION
34082	Elrond Peredhil, 10/02/1890	08/01/2009 16:21	ALLOCATED

6.1 Acknowledging Incoming Referrals

1. Click on a referral with a status set as **New**.
2. Click on the **Acknowledge** button at the bottom of the page.
3. Add any notes that may indicate to the sender how you plan to deal with the referral.
4. Click on **Next.**

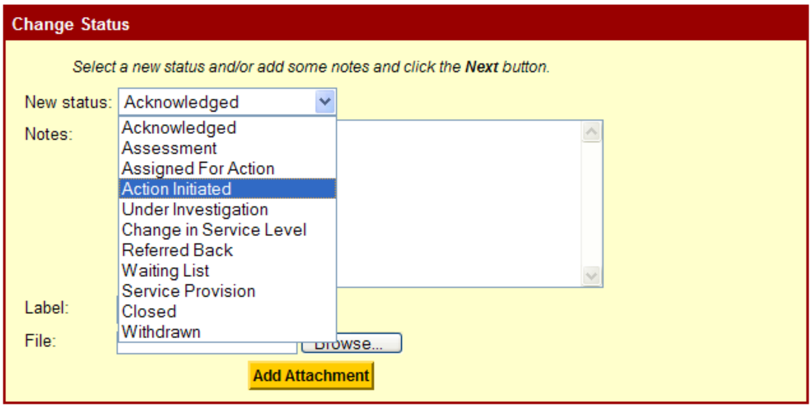
*The status of the referral will now be set to **Acknowledged***



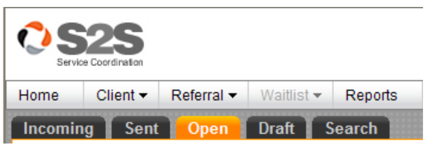
6.2 Changing the Status of Incoming Referrals

To further process this referral, follow the steps below:

1. Click on the referral from either the **Incoming** tab or **Open** tab.
2. Click on the **Change Status** button.
3. Select the status from the drop down list.
4. Add any notes.
5. Attach any extra information if applicable.
6. Click on the **Next** button.



This referral will now only be visible in the **Open** tab from where you can further process or close the referral. Once a referral is closed, the information will be visible from the **Service Records** area.



Note: If you receive referrals via a referral coordinator or service coordinator, the status in your incoming area for new referrals will already be ***Allocated.***

6.3 Sender Notes

If a referral that you have received has the words **Sender Notes** in red after the status of the referral, the sender has added extra notes associated with the referral after it has been sent. See section 7.3 for more information on Sender Notes. Follow the steps below to view and process sender notes for a referral.

18475	Fergus McDowd, 20/09/1934	29/06/2007 17:04	NEW
18007	Barbara Smith, 09/07/1918	29/03/2007 14:44	ACKNOWLEDGED : SENDER NOTES
18262	Lesley Smith, 12/05/1930	29/03/2007 13:04	ACKNOWLEDGED
17992	Jessie Jeffries, 03/03/1921	29/03/2007 13:01	ACKNOWLEDGED

1. Click on a referral marked with **Sender Notes** next to the status.

   The referral will be displayed with the most recent notes at the top of the page in the "Referral Status" box.

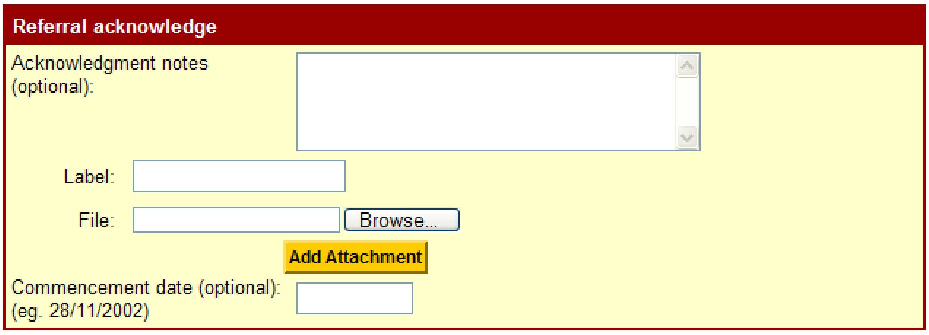
2. To view any associated attachments or previous notes click on the **Status History** tab.

   All sender notes will be listed sequentially on the "Status History" page.

3. To return to the referral, click on the **View** tab

   The referral will once again be displayed.

4. Add any comments or feedback in the space provided if relevant.
5. Click the **Acknowledge** button.



*The **Change Status** button will now appear at the bottom of the page, allowing the referral to be processed further.*

Note: *Steps 3 to 5 are not relevant if a referral has a status of "New".*

7.0 MONITORING SENT REFERRALS

The **Sent** tab is used to store sent referrals that are awaiting acknowledgement by either your service or the receiving service. When both parties have acknowledged the referral it will not be visible in this area. To avoid a build up of referrals in the sent tab, it is advisable to acknowledge changes made by the receiving service.

If you have chosen to receive feedback when sending a referral, the referral will appear here each time a status has been changed by the receiving service.

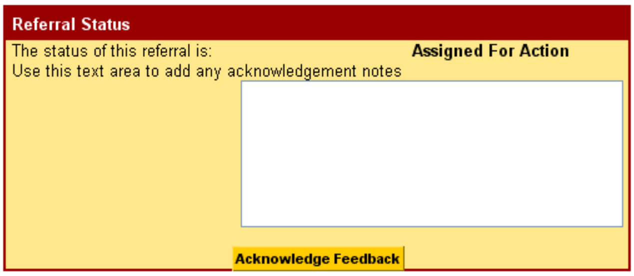
7.1 Acknowledging Feedback

1. Click on a referral in the sent tab that has a status other than 'new'.

   The referral will be displayed with the current status and associated notes at the top of the page.

2. Add any notes in response to the status change.
3. Click on **Acknowledge Feedback.**

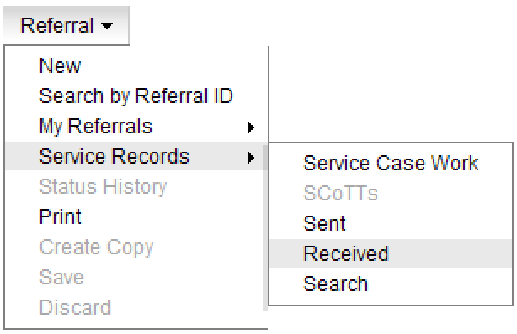
This referral will disappear from the sent tab and re-appear only when the receiver makes a change to the status.



7.2 Viewing Service Records

Service records provide you with a list of referrals that have been sent or received in the past 12 months regardless of their status. To view a comprehensive list of referrals sent or received by your service follow the steps below:

1. Go to **Referral** in the top menu bar.
2. Select **Service Records.**
3. Click on either **Sent** or **Received**.



A list of all sent or received referrals ***for your service*** *will be displayed.*

7.3 Adding a Note to a Sent Referral

This functionality allows you to append additional information to the referrals you've sent. For referrals sent via the system, this is useful if information or attachments important to the referral come to light after it has been sent, or if they were simply forgotten in the first place. A notification email will be sent to the receiver to inform them of your amendments. For referrals sent by fax or PKI email, this can be used to make notes regarding the progress of the referral or to record any other information necessary for your own purpose i.e. no notification is sent. Follow the steps below to add a note to a sent referral.

1 Click on a referral in the sent tab.

The referral will be displayed.

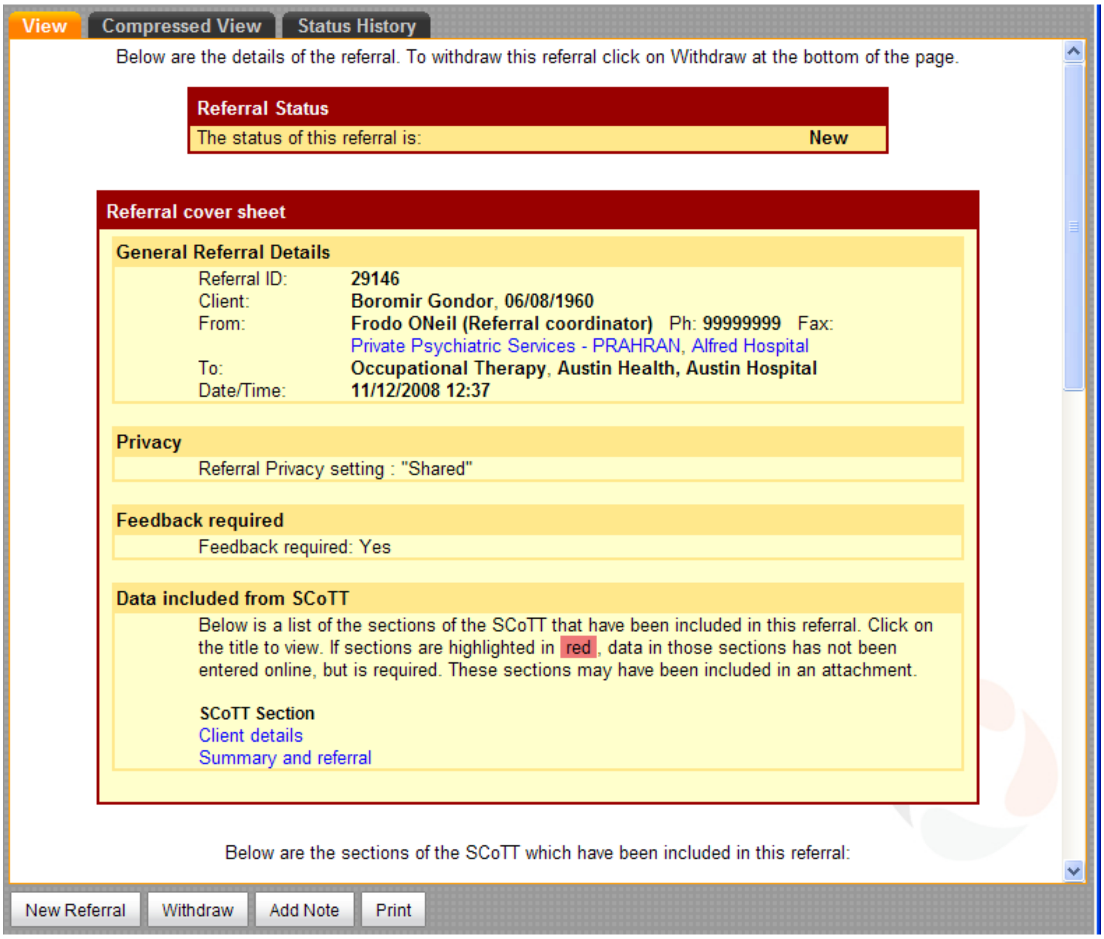
2 Click on the **Add Note** button at the bottom of the page.

The 'referral add note' page will be displayed.

3 Add any notes or attachments associated with the referral. (See section 5.3.3 for instructions on how to attach documents).

4 Click on the **Next** button.

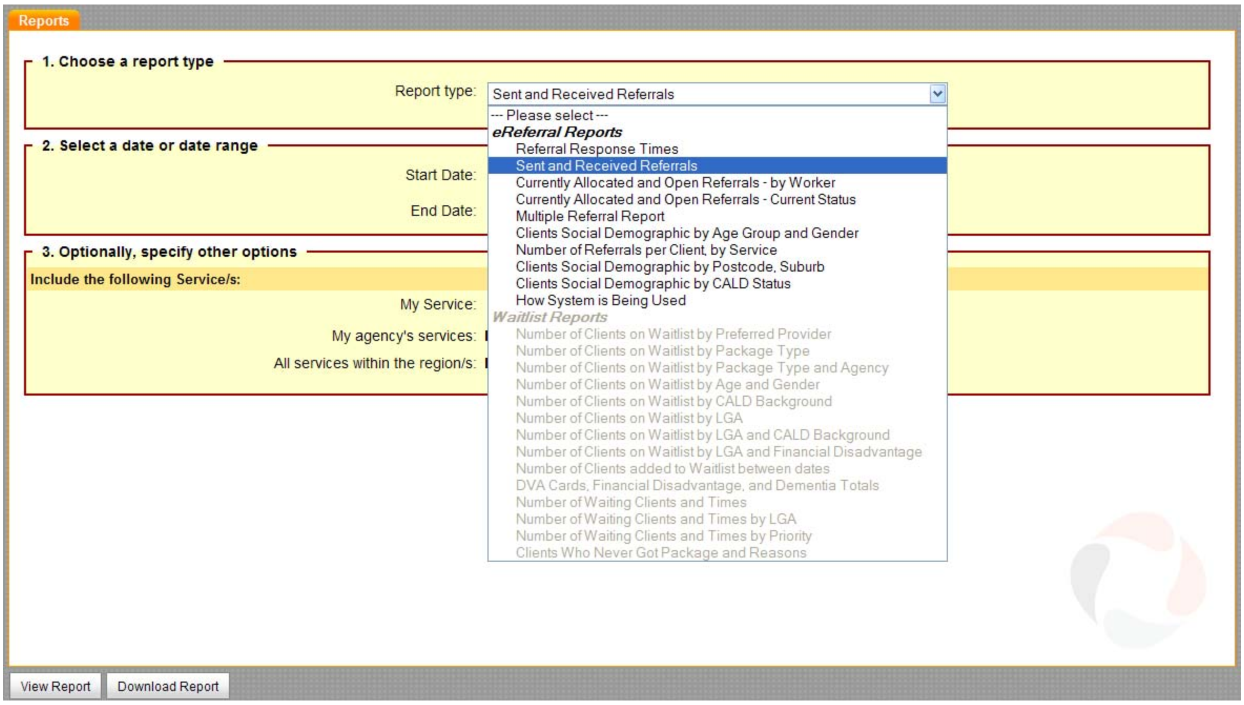
You will then be returned to the view page where your notes will be displayed in the "Referral Status" box at the top of the page. The notes and any attachments will also be available from the "Status History" page. This process can be repeated any number of times.



8.0 REPORTS

Reports may be generated by any user with a role in the system.

8.1 Generating Reports



1. Go to **Reports** in the top menu bar.
2. Select the desired report type from the drop down menu.
3. Adjust the dates to the desired range if it allows a date range
4. Click on **View Report** (to view the report on-line) or **Download Report** (to export the report in Excel format).

   The Report will be displayed.

8.2 Report types

Referral Response Time

This report shows the first status change and the time it took for the provider to make that change from the time the referral was sent. It also provides data on the latest status change and the time it took for the provider to make that change from the time the referral was sent.

Ref ID	Send Agency	Send Service	Receive Agency	Receive Service	First Status Change	Time to Fi	Latest Status	Time to Latest
32910	Alfred Hospital	Private Psychiatric Services - PRAHRAN	Alfred Hospital	Private Psychiatric Services - PRAHRAN	New	0:00:00	Acknowledged	473:07:19
29143	Alfred Hospital	Private Psychiatric Services - PRAHRAN	Alfred Hospital	Private Psychiatric Services - PRAHRAN	New	0:00:01	New	0:00:01

Sent and Received Referrals

This report shows the number of referrals sent and received by a selected service for a given date range.

From Agency	From Service	To Agency	To Service	Number
Alfred Hospital	Private Psychiatric Services - PRAHRAN	Alfred Hospital	Private Psychiatric Services - PRAHRAN	3
Alfred Hospital	Private Psychiatric Services - PRAHRAN	Austin Health, Austin Hospital	Occupational Therapy	2
Alfred Hospital	Private Psychiatric Services - PRAHRAN	Banyule Community Health Service	Occupational Therapy	2
Alfred Hospital	Private Psychiatric Services - PRAHRAN	Box Hill Hospital	Emergency Care Coordination - BOX HILL	3
Banyule Community Health Service	Occupational Therapy	Alfred Hospital	Private Psychiatric Services - PRAHRAN	3
Boroondara City Council	Customer Service Centre	Alfred Hospital	Private Psychiatric Services - PRAHRAN	4
Yarra Ranges Shire Council	Citizenship Ceremonies	Alfred Hospital	Private Psychiatric Services - PRAHRAN	3

Currently Allocated and Open Referrals – by Worker

This report displays the number of open referrals associated with the selected service/s allocated to each worker.

Number	Worker
7	(NOT ALLOCATED)
3	Frodo O'Neil
1	Dopey InfoXchange12

Currently Allocated and Open Referrals - Current Status

This report displays the time that open referrals, associated with the selected service/s, have been in their current status.

Ref ID	Worker (if allocated):	Current Status	Time in Current Status
33955		Assigned For Action	438:52:26
34019		Action Initiated	438:53:36
34049	Frodo O'Neil	Allocated	439:23:35
34077		Acknowledged	439:34:14
34082	Frodo O'Neil	Allocated	439:18:38
34106	Frodo O'Neil	Under Investigation	438:56:10
34174		Acknowledged	152:21:14
34284	Dopey InfoXchange12	Allocated	439:14:09
34535		New	432:45:32
34538		New	432:45:32
37374		New	96:34:32

Multiple Referral Report

This report provides data on all referrals sent. It shows the number of referrals sent in a single referral event to one or multiple service providers.

Number of Referrals Sent	Number of Services Selected
6	1
2	2

Referrals by Social Demographic - Age Group and Gender

This report provides data on the age and sex of the referral clients.

Age Group	Male (sent)	Male (received)	Female (sent)	Female (received)	Other (sent)	Other (received)	All (sent)	All (received)
41 to 50	0	1	0	0	1	0	1	1
51 to 60	1	0	0	0	0	0	1	0
81 to 90	1	0	0	0	0	0	1	0
90+	5	0	2	0	0	0	7	0
All Ages	7	1	2	0	1	0	10	1

Number of Referrals per Client by Service

This report provides data on the number of referral a given client has been attached to by the service the referrals were sent & received by.

Number	Client ID	Send Agency	Send Service	Receive Agency	Receive Service
3	9780	Mount Eliza Aged Care Assessment Service (MEACAS)	Aged Care Assessment Service (ACAS)	Yarra Valley Community Health Service	Indigenous Clinics
2	29620	Yarra Valley Community Health Service	Indigenous Clinics	Yarra Ranges Shire Council	Citizenship Ceremonies
1	26684	Yarra Valley Community Health Service	Indigenous Clinics	Yarra Ranges Shire Council	Citizenship Ceremonies
1	26630	Yarra Valley Community Health Service	Indigenous Clinics	Yarra Ranges Shire Council	Citizenship Ceremonies

Referrals by Social Demographic - Postcode, Suburb

This report displays suburb and postcode data of clients that have had a referral associated with this service.

Suburb	Postcode	Number Sent	Number Received
Rivendell	3001	68	12
Rivendale	3006	56	0
Rohan	3268	38	32
Isenguard	3056	30	0
Mordor	3065	26	5
Morrior	3096	9	6
The Shire	3858	8	1

Referrals by Social Demographic - CALD Status

This report provides data on the number of referrals sent by the language and country of birth of the clients associated with the referrals.

Country of Birth	Main Language	Number Sent	Number Received
America	English	8	0
Australia	English	13	20
Japan	Japanese	0	1
New Zealand	English	2	3
Austria	English	3	1
unknown	Other	3	1
Russia	Russian	1	2
England	English	0	1

How Referral Forms Are Being Used

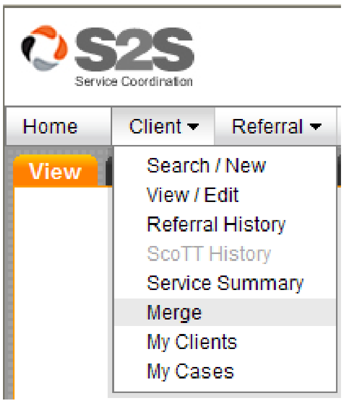
This report displays whether referrals sent and received by the selected service/s consist of data entered using the online form tools, attachments or both.

Referral consists of...	Number Sent	Number Received
Combined Online Forms / Attachment	3	2
No Online Forms or Attachment	2	3
Only Attachment	0	0
Only Online Forms	34	3

9.0 MERGING CLIENTS

The Merge client function is used to merge two records that are actually the same person.

Step 1. Hover over **Client** in the top menu and click **Merge**



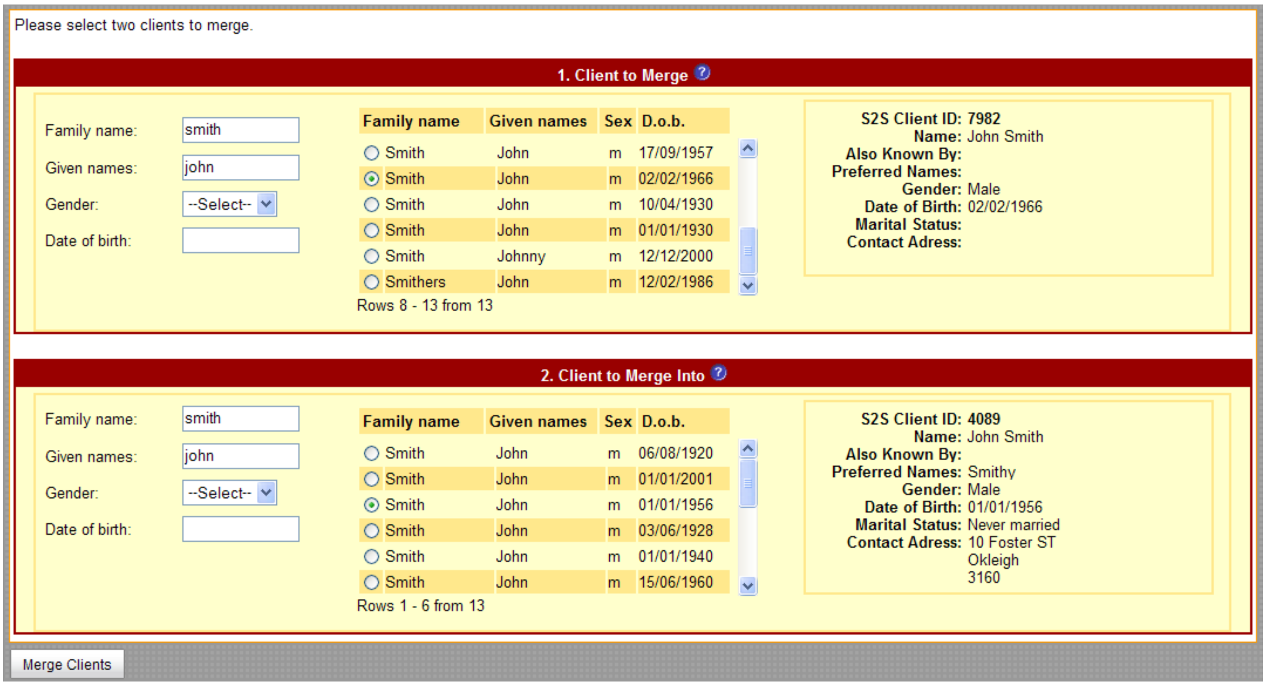
Step 2. Select the client with incorrect spelling/details etc in field 1. (Client to Merge).

Step 3. Choose the client from the list generated.

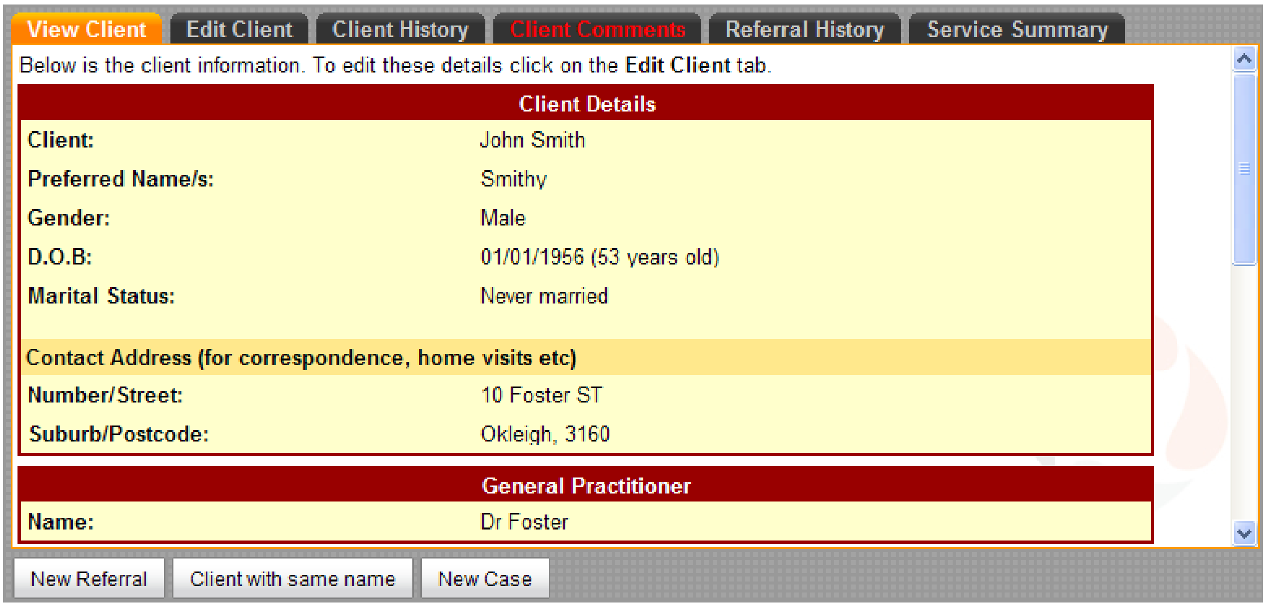
Step 4. Select the primary or correct clients name in field 2. (Client to Merge Into).

Step 5. Choose the client from the list generated.

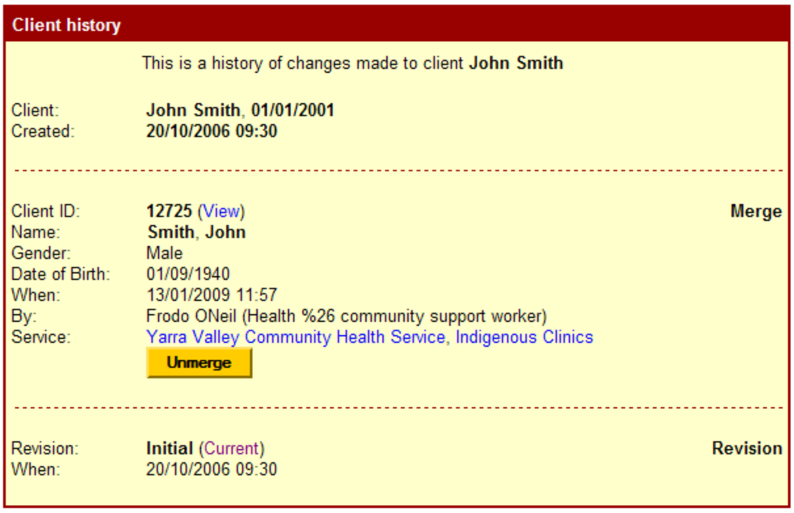
NOTE: Do not use DOB when entering details of the client



Step 6. Click on **Merge Clients** at the bottom left of the screen.



To view the history of the client click on the **Client History** Tab.

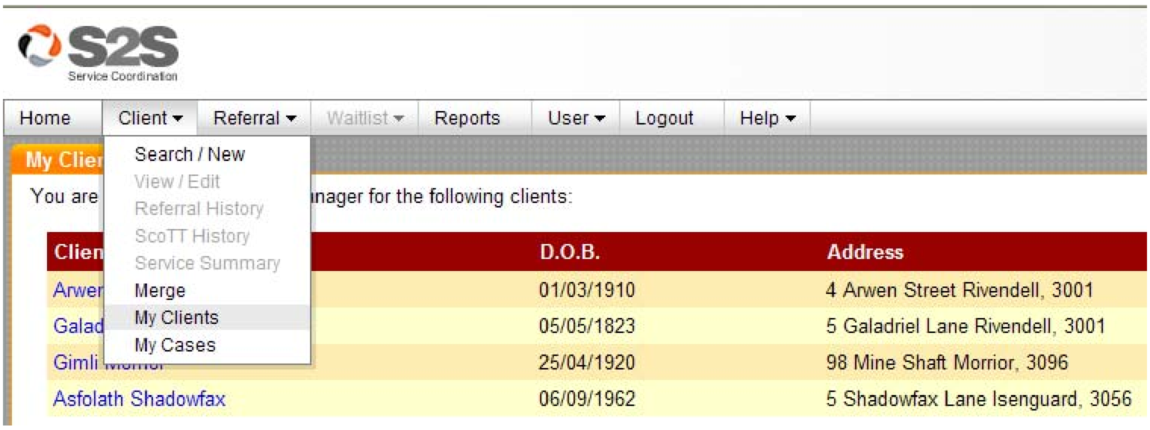


If you made a mistake in merging the two records, you can always unmerge, by clicking on the **unmerge** button in yellow.

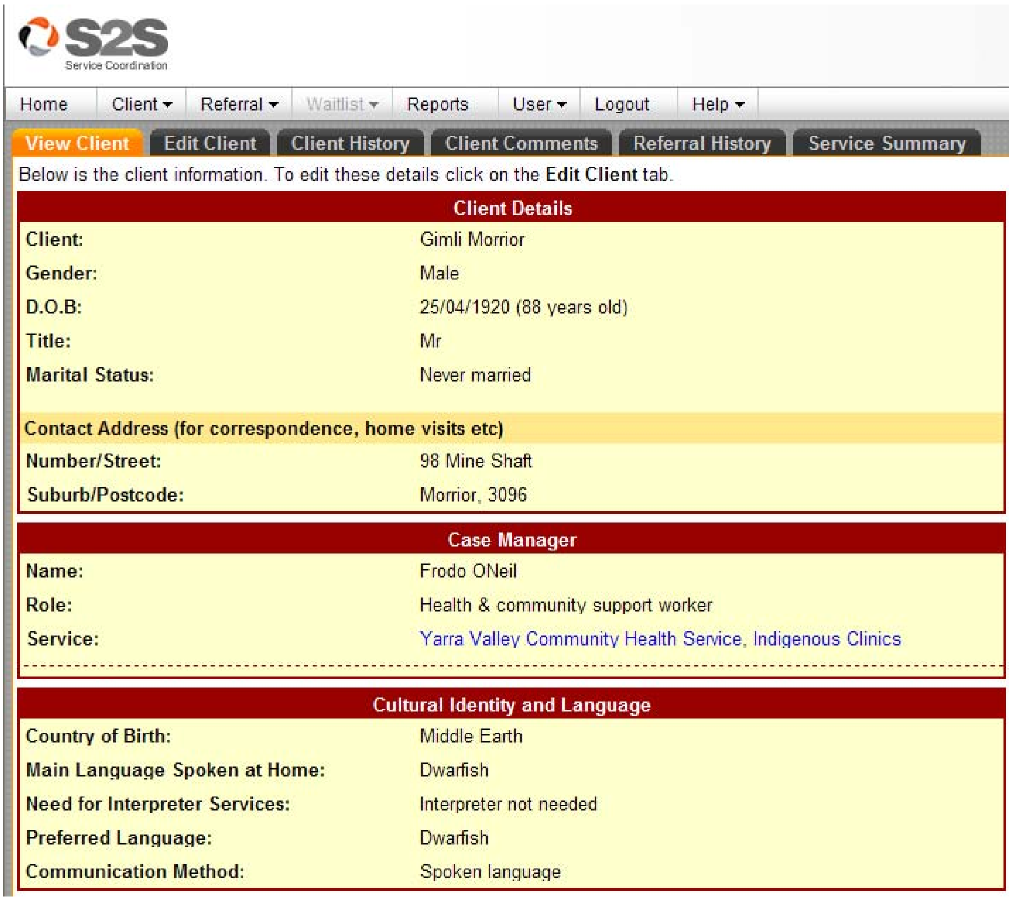
10.0 SEARCHING FOR CLIENTS OR REFERRALS

10.1 My Clients

You may at times want to view all of the clients that you are a designated case worker for. To do this, you can hover over **Client** in the top menu and click on **My Clients**.



To view the client information, simply click on the row or the client name that you want to view the detail for.



10.2 Searching for Referrals relating to clients

To find a referral to a particular client, you can either locate it in the **incoming**, **sent** or **open** tab, or do a **search** for the client. Refer to section **5.1 Searching for a Client**. Once you have clicked on the client and are viewing them as shown above in the **view client** tab, you can then click on the **Referral History** tab. You will be required to tick a consent box again to view the details of this client before it will take you to the **Referral History** tab.

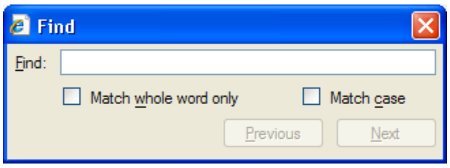
Tick the Consent check box if you have had previous consent from the client or have been sent the referral by a service that has received consent and click **Proceed**. The **Referral History** tab will give you a list of the referrals that have been created for the particular client in the last 12 months.

REF ID	DATE/TIME	FROM / TO	STATUS
34538	09/01/2009 16:01	From: Indigenous Clinics, Yarra Valley Community Health Service To: External Service, External Agency	NEW
34535	09/01/2009 16:01	From: Indigenous Clinics, Yarra Valley Community Health Service To: Occupational Therapy, Austin Health, Austin Hospital	NEW
31050	17/12/2008 11:04	From: Customer Service Centre, Boroondara City Council To: Allied Health Services: Occupational Therapy, Manningham Community Health Service	ACKNOWLEDGED
31047	17/12/2008 11:04	From: Customer Service Centre, Boroondara City Council To: Citizenship Ceremonies, Yarra Ranges Shire Council	ACKNOWLEDGED
31044	17/12/2008 11:04	From: Customer Service Centre, Boroondara City Council To: Aged Care Assessment Service (ACAS), Mount Eliza Aged Care Assessment Service (MEACAS)	REFERRED BACK

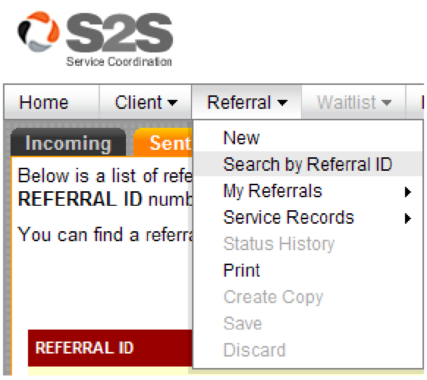
You can view the details of each referral by clicking on the Referral ID number.

10.3 Searching the system for Referrals by referral number

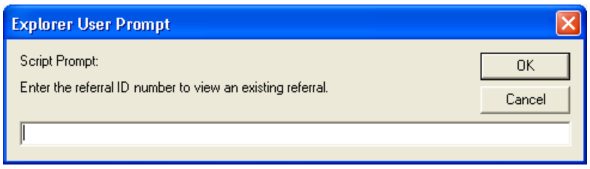
If you know the referral ID number, you can search for the referral in the incoming, sent or open tabs press CTRL+F on your keyboard and type the Referral ID you are searching for, then press ENTER.



There may be times when you are unsure of what area of the system a particular referral is in. You may have thought it was in your incoming, but upon inspection, find that it is not there. To locate your referral in the system, you can hover over **Referral** and click on **Search by Referral ID**.



A pop up window should appear and will request you to enter the referral ID number. Enter the number and click **OK**



NOTE: You may get a message like this one below when clicking on **Search by Referral ID**

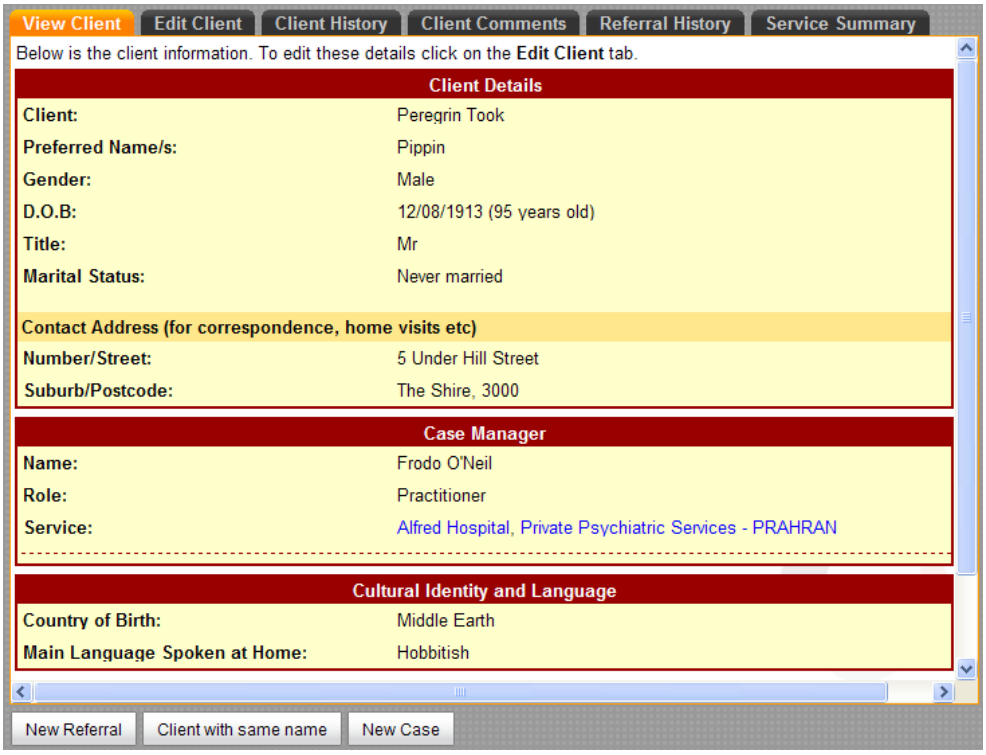
If you click on the banner and click on Temporarily Allow Scripted Windows, it will allow you to resubmit the search. For assistance with pop up blockers in various broswers, it is best to consult your IT department. They can help you to enable pop ups from our sites.

11.0 CASES

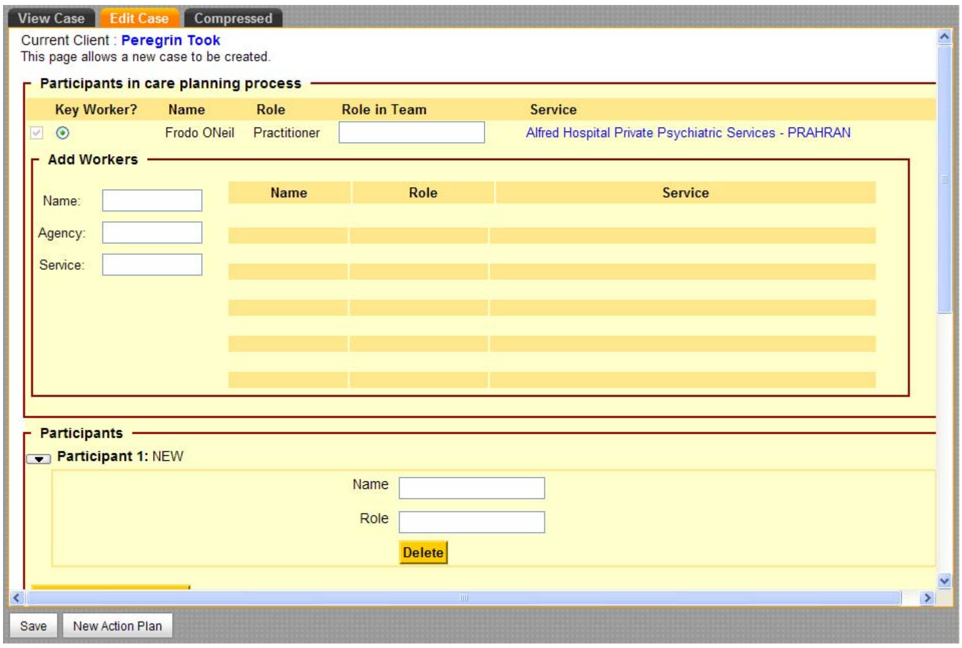
The purpose of creating cases is to aid in inter-agency care planning to meet the variety of needs of a given client. It is useful to use this area when the client is a member of multiple services and has complex and/or multiple issues that require support in a coordinated approach. It shows who is involved in the client's care, the main issues presented, agreed goals developed together, planned actions and who is responsible for each action.

11.1 Creating a New Case

In all circumstances, when viewing a client, the system will offer you the opportunity to create a new case. You will see the **New Case** button at the bottom left of your screen.



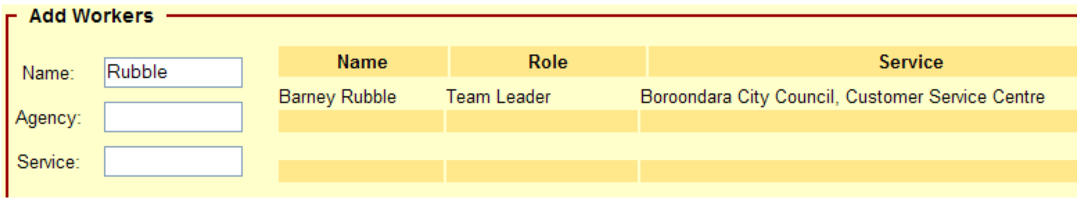
Upon clicking the **New Case** button, you will be directed to the **Edit Case** tab:



S2S

11.1.1 Adding case workers

The first section allows you to add in the various providers in the planning process for the case. Your name, role and service automatically appear at the top of this section and it allows you to type in your particular role in this case. In most cases, if you are the person creating the case, you will be the key worker, so you can type ‘key worker’ in the **Role in Team** Feild. To add other team members, go to the **Add Workers** section, and type one or all of **name**, **agency** or **service** of a worker on this case and put your cursor in the next field. The system will automatically draw a list from the database matching the information that you provided.

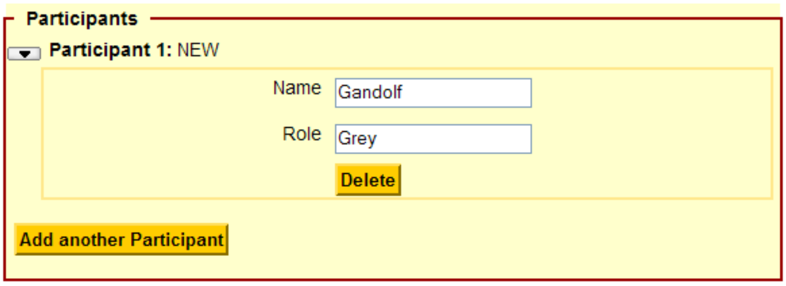


To add the worker to the system, click on the row of information on that team member that has appeared. They will be added to the list above for you to type in their role in the team.

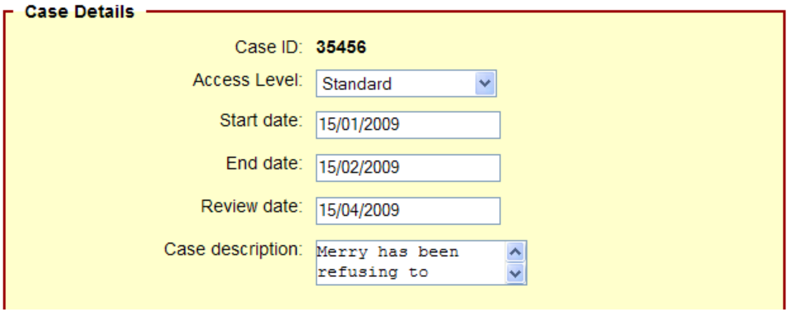
You can continue to add more workers in the care planning process.

11.1.2 Adding Participants

You are able to add participants that contribute to the client's care. This could be the client's GP, their substitute decision maker, a family member, volunteers or friends who provide assistance.



11.1.3 Case Details



Access Level - Under the case details section, you can add the access level of:

- Standard
- limited
- case worker only

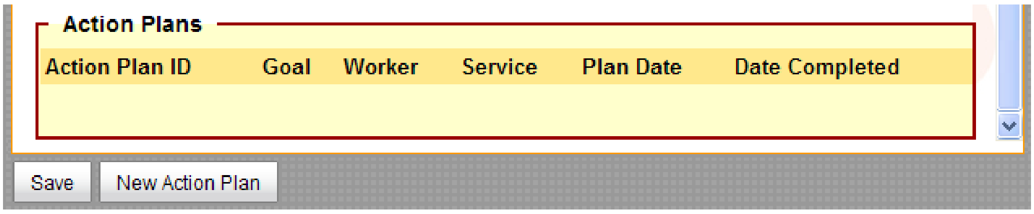
Dates - Start Date, End Date and Rview date should be entered to keep track of the case.

Case Description - This should just be a summary and purpose for the case being created.

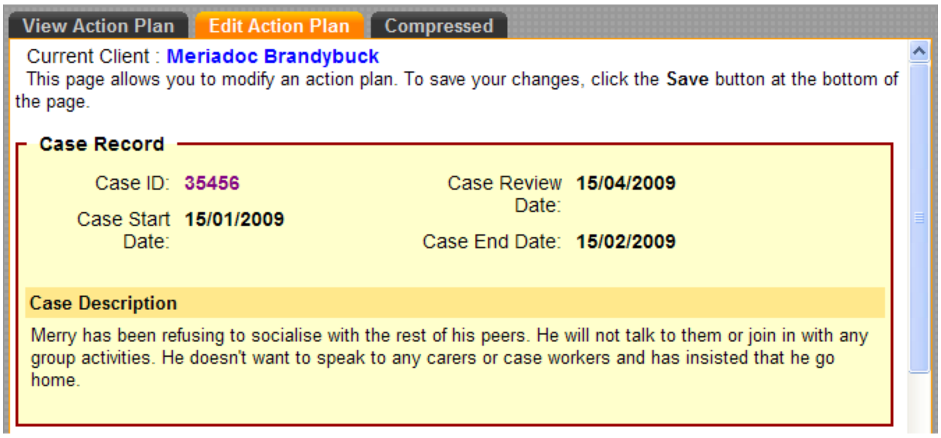
Attachments – You can attach any supporting documentation such as social profile, assessments, service plans, support plans, GP plans, advanced care plans, emergency management plans, screening or risk alerts.

11.1.4 Action Plans

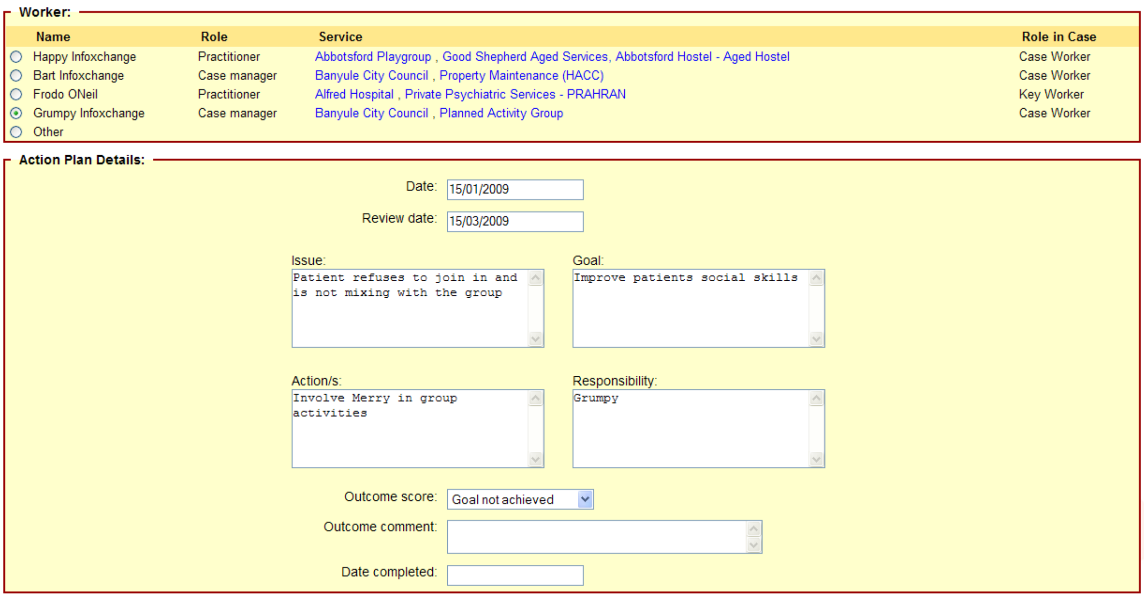
Usually cases are set up where agencies are already providing services to the client and therefore, action plans are decided upon as a group. However, if the client doesn't use the services that will be involved, then the Key Worker may be the sole person to set up the Action Plan. All action plans related to the case will be listed here. To create a new action plan, click on the **New Action Plan** button at the bottom left hand side of your screen.



The case Description is automatically displayed in the case record section:



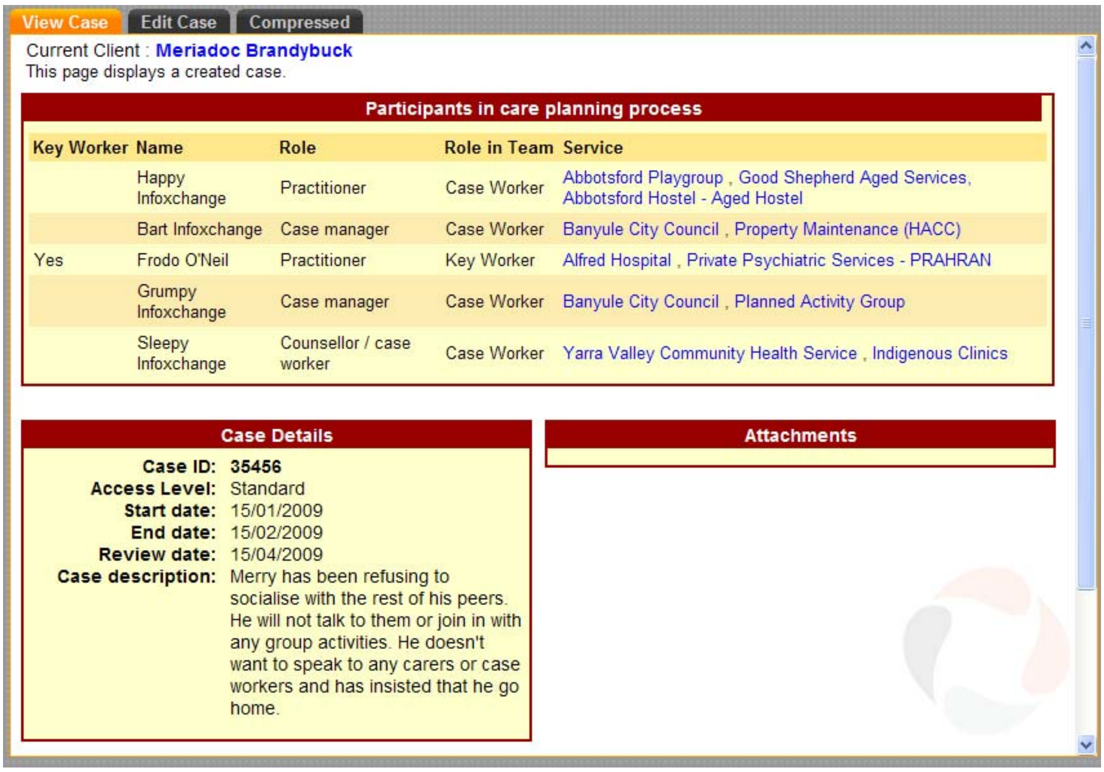
You can click on the radio button to the left of the worker to select them for this particular **Action Plan**.



Once you have completed filling out the action plan, click Save at the bottom left had side fo the screen. Your action plan will appear at the bottom of your **View Case** & **Edit Case** tabs:

11.2 Reviewing and editing an Existing Case

After a case has been created, it is possible to review and edit it. To do this, hover over **Client** and click on **My Cases**. Click on the case you would like to edit or view. It will bring up the **View Case** Screen.



To edit the action plan, scroll to the bottom and click on the action plan ID. To edit the case, click on the **Edit Case** tab. From here, you can add more action plans and edit other areas of the case. For printing purposes, you can also view the case in compressed format and click **print** and the bottom left of the screen.

12.0 SUPPORT HELPDESK

Password or system support is available via phone or email:

Monday to Friday: 8:30am - 5:30pm

Email: support@s2s.org.au

Phone: (03) 9418 7466

13.0 ELECTRONIC REFERRAL DEMO SITE

A demonstrational website has been created to allow system users to practice using the eReferral system and avoid errors being made on the real system.

The test site is located at https://demo.s2s.org.au/ and can be accessed using one of the following usernames and passwords:

Username:	happy	**Username:**	grumpy
Password:	infoxchange	**Password:**	infoxchange

14.0 TROUBLE SHOOTING

This section provides some solutions for common queries or problems that might arise whilst using the S2S Service Coordination Referral System.

14.1 Using the Back Button

Using the back button that is a part of the web browser will sometimes lead to system errors. Do not use this button, instead it is recommended to = remove navigate your way through the system using the available menu options, tabs or yellow buttons.

14.2 Scanning Documents

The following scanner settings are recommended when attaching a scanned document to a referral:

- Black & White image
- 72 - 200 dpi resolution

Note: Images scanned at more than 200 dpi will have its edges clipped when printed directly from the system. To effectively print such documents first save the file to the hard drive and then print.

14.3 Internet Explorer Speed Settings

Slowness may be experienced when using the S2S system as a result of incorrect Internet Explorer settings. Follow the steps below to adjust the setting:

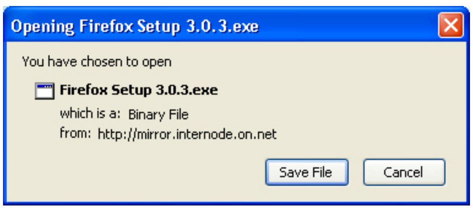
1. From the menu options on the browser select **Tools**, then **Internet Options.**
2. Click on the **Advanced** tab.
3. Scroll down until you see the **Security** setting.
4. Untick **'Do not save encrypted pages to disk'**

Experience shows that using modzilla can be 2-4 times faster than internet explorer
You can Download Mozilla Firefox from this site: http://www.mozilla.org/download.html

1 Click on Firefox

2 Then click on free download

3 Click on Save File



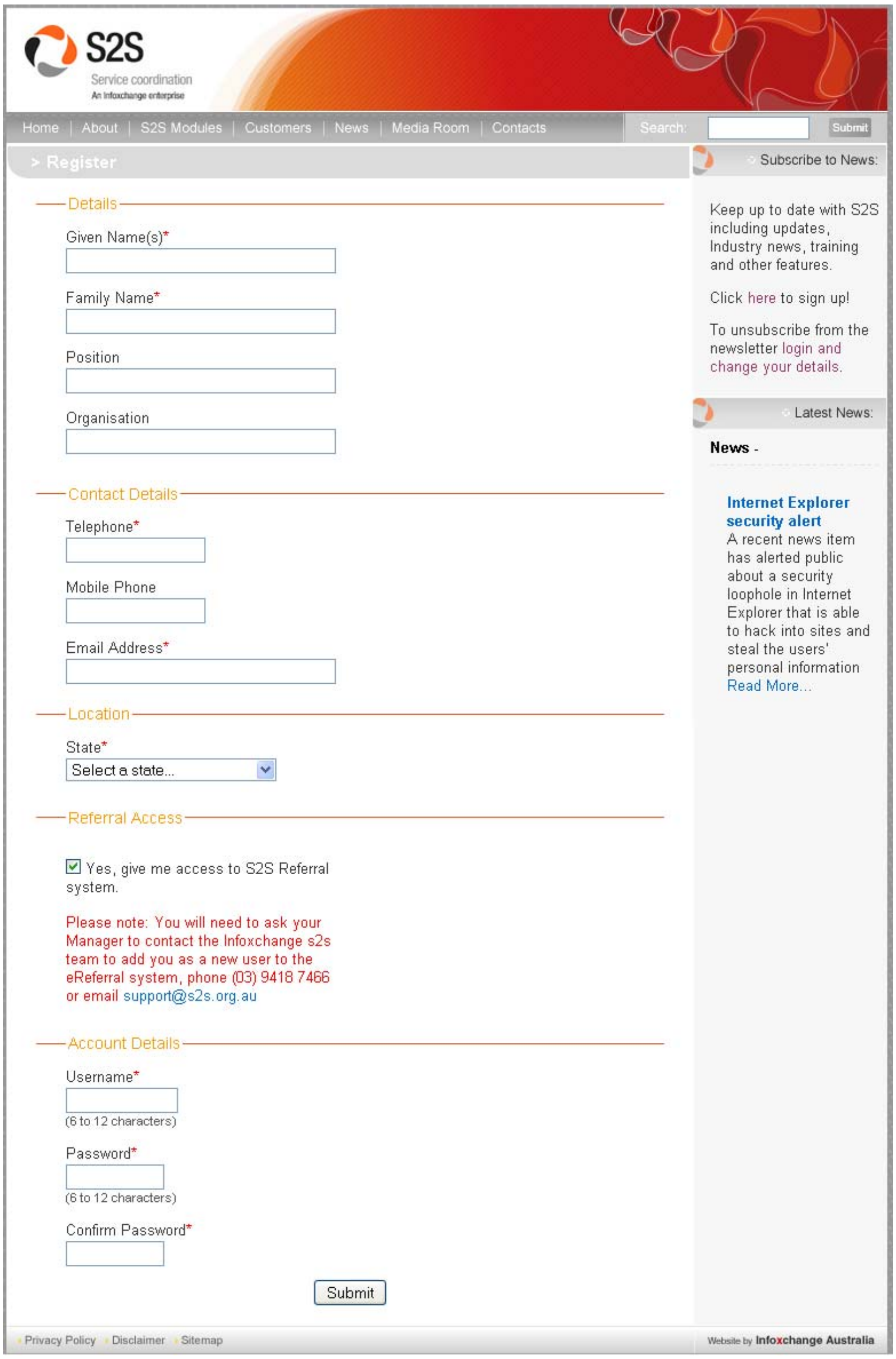
4 Choose to save it on your desktop if it doesn't do it automatically and then double click on the install icon on your desktop to run the Firefox Setup.exe:

If you have trouble installing, please call your IT department to do the install for you.

15.0 APPENDIX

15.1 User Registration Form

Below is an example of the on-line form that needs to be completed by all users before access to the system may be approved. See part *2. Registering as a Member* for instruction on completing the form.



S2S
Service coordination
An Infoxchange enterprise

Home | About | S2S Modules | Customers | News | Media Room | Contacts   Search: Submit

> Register

Details

Given Name(s)*

Family Name*

Position

Organisation

Contact Details

Telephone*

Mobile Phone

Email Address*

Location

State*

Select a state...

Referral Access

Yes, give me access to S2S Referral system.

Please note: You will need to ask your Manager to contact the Infoxchange s2s team to add you as a new user to the eReferral system, phone (03) 9418 7466 or email support@s2s.org.au

Account Details

Username*

(6 to 12 characters)

Password*

(6 to 12 characters)

Confirm Password*

Submit

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News -

Internet Explorer security alert

A recent news item has alerted public about a security loophole in Internet Explorer that is able to hack into sites and steal the users' personal information Read More...

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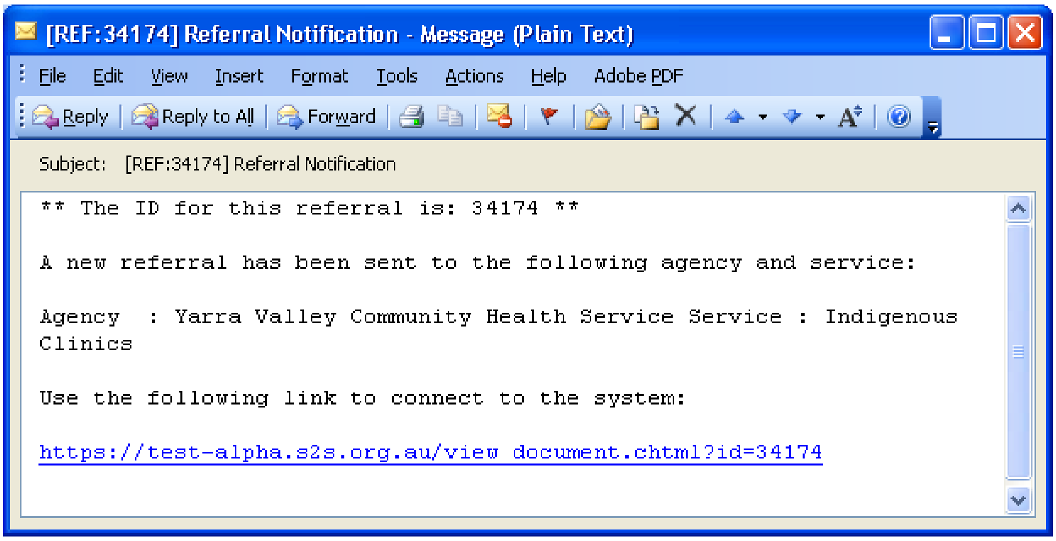
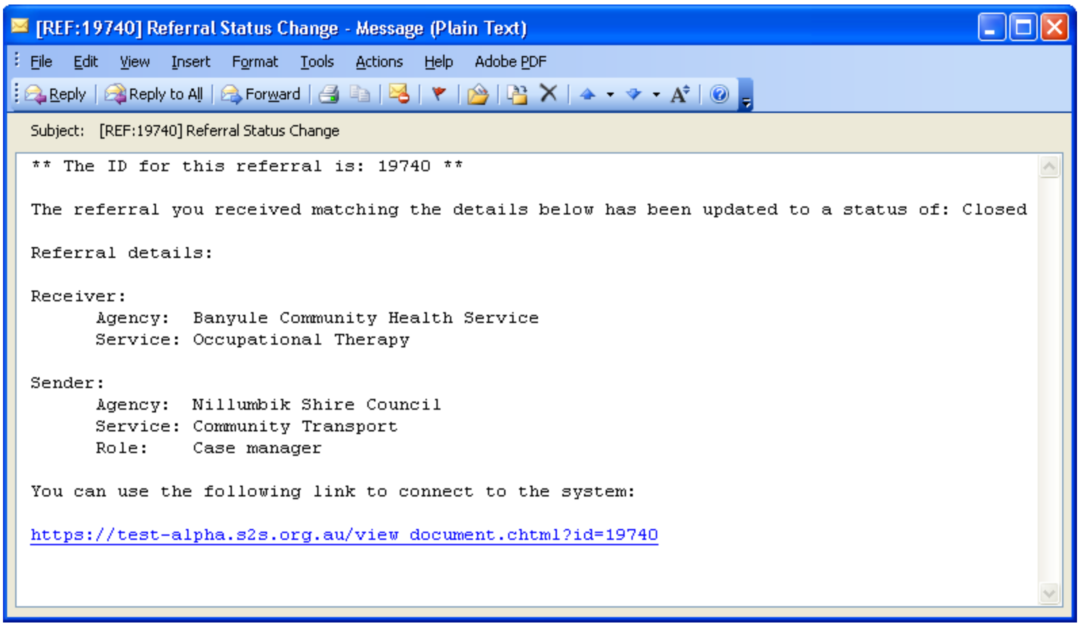
15.2 Email Notifications

Below is an example of an email notification of a new incoming referral.



Below is an example of an email notification of a change in status for a sent referral.



15.3 Information Access Guidelines

The privacy and consent principles underlying the Electronic Service Coordination System (ESCS) are that the information necessary to provide the most appropriate health/community services may only be accessed (with consumer consent) in order to provide the:

- Right information
- To the right people
- For the right reason
- In the right way
- At the right time.

15.4 Information Access Levels

To facilitate service coordination while safeguarding privacy consumers are asked (for a given referral) to give consent for access to information at one of the following levels:

Information Access Level	Information Accessible to Direct Referral Recipient	Information Accessible to Other Providers (with consumer consent)	Service Coordination Levels
Standard	All referral information sent directly to service	All information and attachments can be accessed by practitioners subject to consumer consent.	High
Limited	All referral information sent directly to service	The consumer identification, sending and receiving services, the sending practitioner, the referral date/time, the current status, service start and end dates and the most recent feedback or outcome.	Medium
Sender/ Receiver only	All referral information sent directly to service	The referral is only visible to sender and receiver and other parties cannot see that a referral has been made.	Extremely Limited

15.5 Information Access Level Setting and Consent Procedures

1. To make a referral using the Electronic Service Coordination System (ESCS), agencies must obtain consent to do so from consumers. This consent is to be recorded on the Consumer Consent to Share Information form, the document used for general referral consents. This form should be completed in the usual manner including providing privacy information but consents relating to use of ESCS must also be recorded on this form as outlined below.
2. Practitioners should ascertain the appropriate Information Access Level using the bold text laid down on the Consumer Privacy and Consent Information Sheet. A copy of that sheet should be given to the consumer/care/interested person if requested. If the consumer/carer requests further information or if the practitioner believes it should be provided, explain fully the 'Limited' and 'Sender/receiver only' levels. The Privacy and Consent Information Booklet contains the necessary detailed information. Note that selecting the Information Access Level is the prerogative of the consumer.
3. Consent to use ESCS to make the referral and access the system must be obtained. Verification that this has been done should be recorded by entering 'ESCS' into the third column of Section 1 of the Consumer Consent to Share Information form.
4. In addition, the Information Access Level selected by the consumer for a particular referral must be entered in this column i.e. Standard, Limited or Sender/receiver only.
5. The entry in the third column might therefore be: ESCS – Standard. Any other limitations on the use of ESCS should also be recorded at that point.
6. A *Consumer Consent to Share Information* form remains current and valid for a single episode of care constituting the primary purpose for which information was collected or a directly related secondary purpose the person would reasonably expect.
7. If it is decided that a referral is necessary subsequent to completion of the initial Consumer Consent to Share Information, practitioners should review the contents of that form and, if the situation is already covered, proceed with the referral in accordance with the stated wishes of the consumer.
8. If an existing, current Consumer Consent to Share Information form does not cover the referral in question, a new form must be completed. Again, the practitioner will record the decision by the consumer on general use of ESCS and Information Access Levels.
9. Note that when a practitioner checks a consent box in ESCS, this constitutes permanently recorded confirmation that the practitioner has taken the necessary steps to obtain consumer consent (written, verbal or given by an authorised person on behalf of the consumer).
10. A hard copy of all Consumer Consent to Share Information forms should be retained by the sending agency and a copy must be given to the consumer if requested.

15.6 Obtaining Consent

Practitioners provide consumers with the following brief, simple verbal information on interview (much more detailed information can be provided on request or if the practitioner considers a more detailed explanation to be necessary):

1. **To provide the best possible service, I would like to make referrals to ………………………….. using our electronic referral system. Do I have your consent to do this?**

2. **In the future, services wanting to access this information may only do so with your consent. Are you happy for practitioners who have your consent to access <u>all</u> the information in this referral? *[Standard Information Access Level]***

   - If the consumer has any reservations and/or does not consent to use of the Electronic Service Coordination System (secure web-based electronic referral), then alternative but less satisfactory ways of making the referral are available and the consumer must be advised of these.
   - If the consumer has any reservations and/or does not consent to the 'Standard' Information Access Level, the more restrictive 'Limited' and 'Sender/receiver only' Information Access Levels must be explained.

15.7 DHS Consumer Consent to Share Information Form

Below is the DHS Consumer Consent to Share Information form, used to obtain consumer consent when sending referrals via the eReferral system. Use Section 1 of this form to define the level of access for a referral that is being sent.

Consumer Consent to Share Information

To record freely given informed consumer consent to share their information with a specific agency/ies for a specific purpose/s.

Consumer

Name: Homer Simpson
Date of Birth: dd/mm/yyyy 12 / 12 /1981
Sex: male
UR Number: 1234
or affix label here

Section 1: Proposed Information Uses and Disclosures

The following service(s) are recommended. It is also recommended that relevant information is forwarded to the agency(s) that provide these services, in order that consumers receive the best possible care.

Service Type Code: Examples: – Physiotherapy – Specialist consultant	Name of Agency Examples: – Any agency – Nominated clinic	Type of Information *(including limits as applicable)* Examples: – All relevant information – Test results only
Physiotherapy	Somewhere clinic	**eReferral - Standard**
Podiatry	Another clinic	**eReferral - Limited**
Drug and alcohol withdrawal	Bandwagon clinic	**eReferral – Sender/receiver only**

Note *– Only Section 1 of the consent form is displayed here, please refer to www.s2s.org.au to access the complete document.*